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SOFTWARE PRODUCT MANAGEMENT

KANBAN TUTORIAL WITH TRELLO

Kanban Tutorial with Trello

In this tutorial, we'll walk you through the steps of creating a Kanban board using Trello, and understand how to visualize the workflow on a Trello board.

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Prerequisite

- Finish watching [Video 2.4.2: Kanban](#)
- Read pg. 41-42 from [Course Notes](#)



What is Kanban?

Kanban is a project management system invented by Taiichi Ohno, an industrial engineer at Toyota. Kanban involves a technique to organize and track project progress visually, which is widely used even outside Agile or Lean software development. Kanban technique uses a board, with a set of columns labeled by the stages of completion. In its simplest form, it follows the "To Do", "Doing", "Done" workflow. An effectively managed Kanban board will give you a clear picture of your project status at a glance. It can also help with improving efficiency, productivity and collaboration.

What is Trello?

Trello is a powerful project management software that enables users to coordinate tasks and visually manage projects. As a productivity tool, it allows individuals and teams to organize and track work through a system of customizable boards, lists, and cards. According to the [onlyft report](#), Trello is taking about 18% of the market share, and there are around 12,000 companies that use Trello.

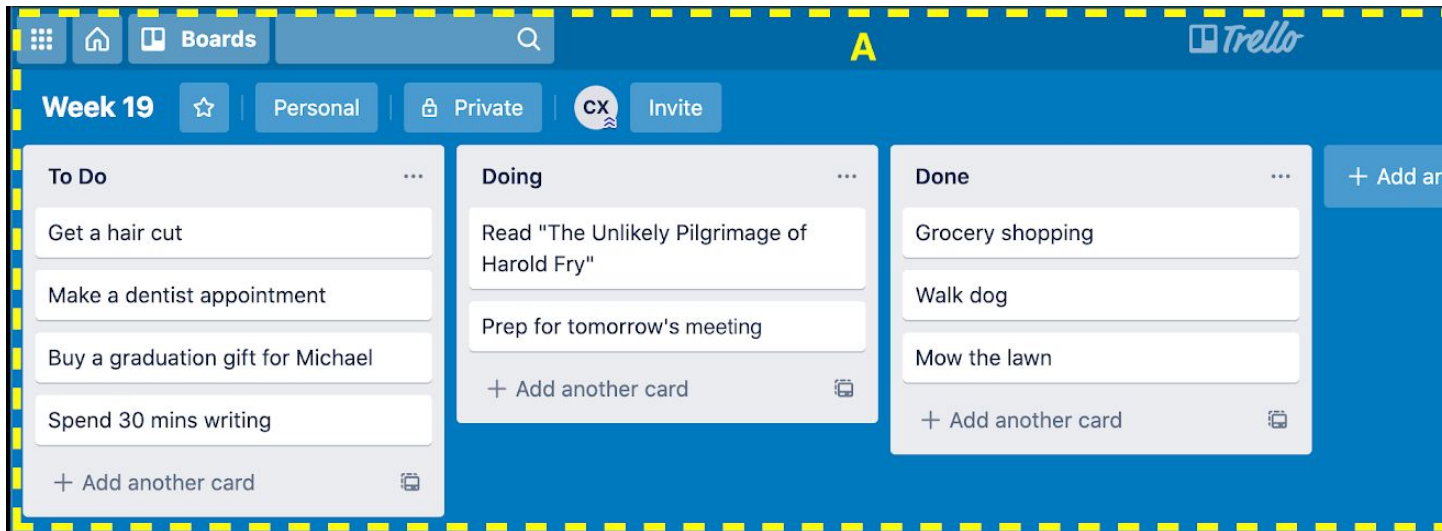
Understand Trello Basics

A Trello board has four key components, namely **Boards**, **Lists**, **Cards** and **Menu**.

A. Board

A **board** is a place to keep track of work and see its path towards completion.

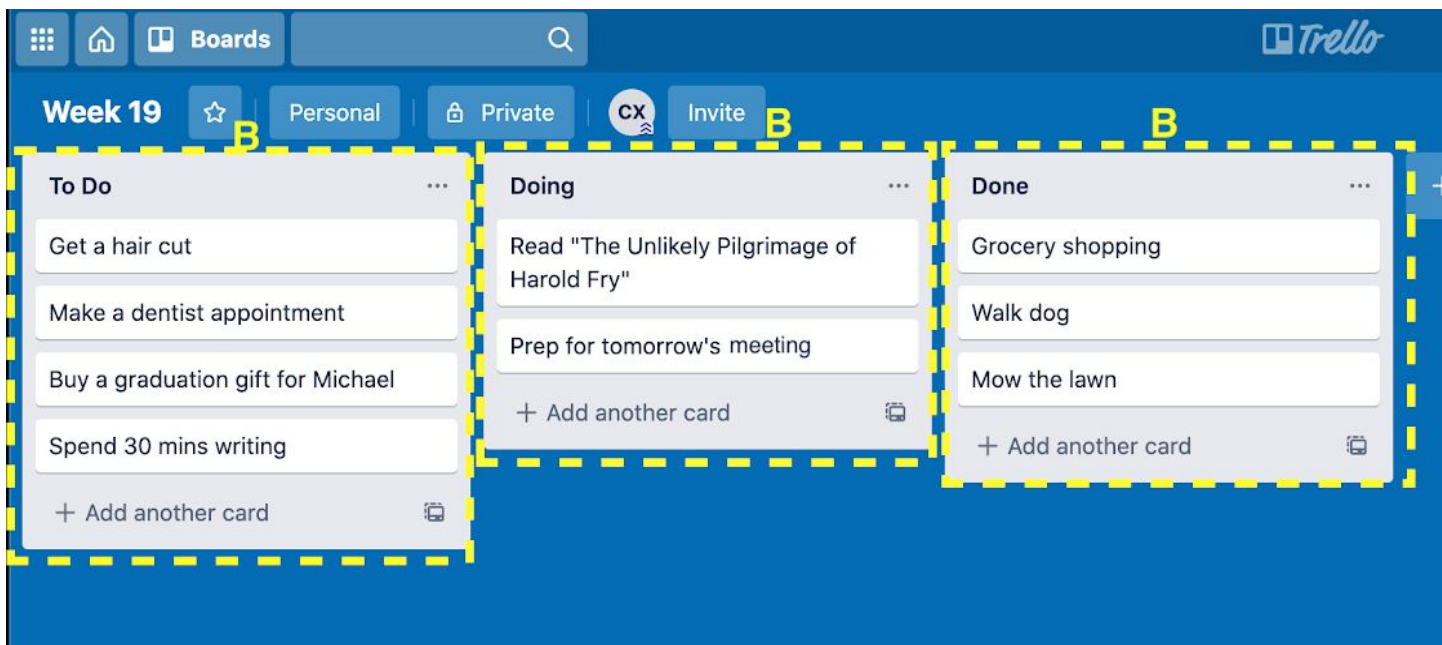




B. Lists

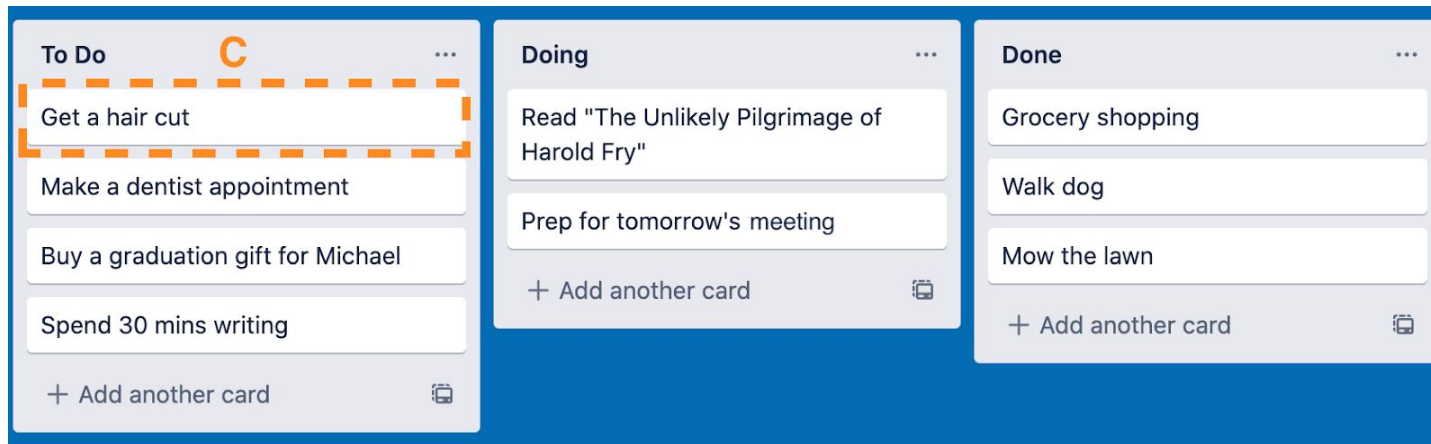
A Trello board is made up of lists, which often represent steps.

Think about the way you are delivering work and create a new list for every step of that process. Take the simplest **To Do, Doing, Done** workflow as an example: **To Do** is a **list** that holds multiple tasks, which can be represented by Cards.



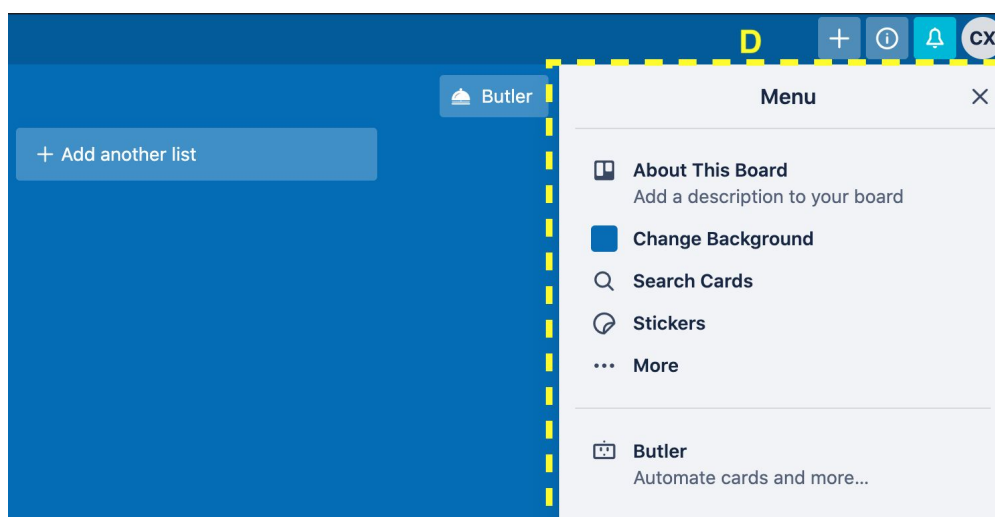
C. Cards

Each **card** in Trello corresponds to a task in your workflow. Add cards to lists to keep track of that workflow. In Trello, you can drag and drop cards across the board to show progress or organize them into different orders to prioritize some work. In the simplest **To Do, Doing, Done** workflow, cards start in the **To Do** list and travel all the way to the **Done** list.



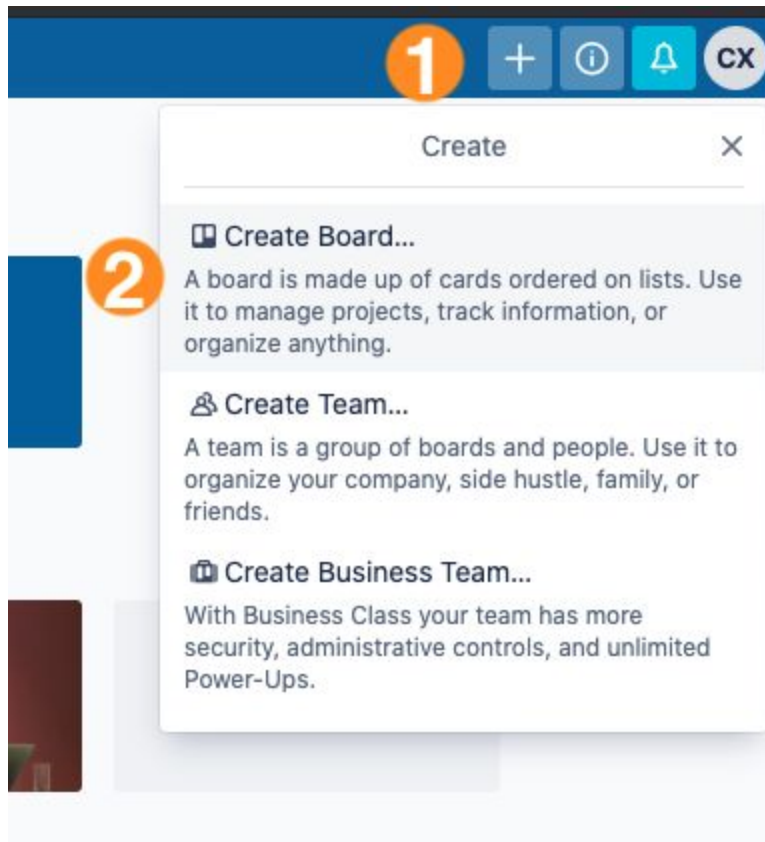
D. Menu

Menu is the mission control center for your board. The menu is where you manage members, control settings, filter cards, and much more.

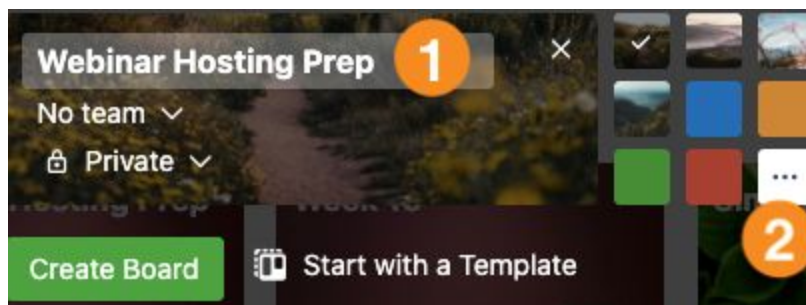


Create A Trello Board

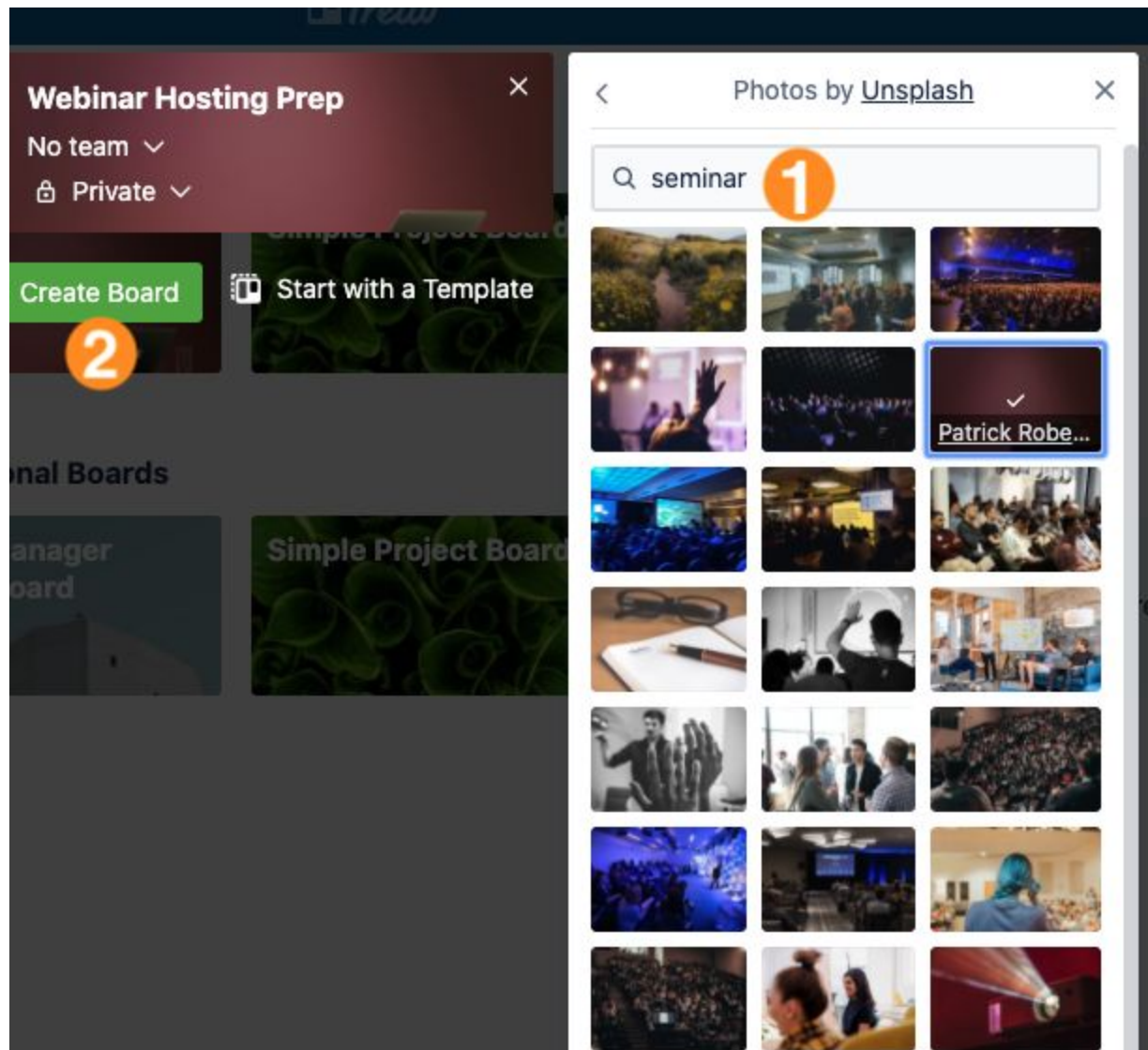
To create a new Trello board, click the plus sign at the top right corner of Trello and select *Create Board*.



Let's add a board title. Suppose you are about to host a webinar next month, and you'd like to do some preparation before it. We are also going to change the board background. Click on the ellipses sign, then **see more** beside *Photos*.



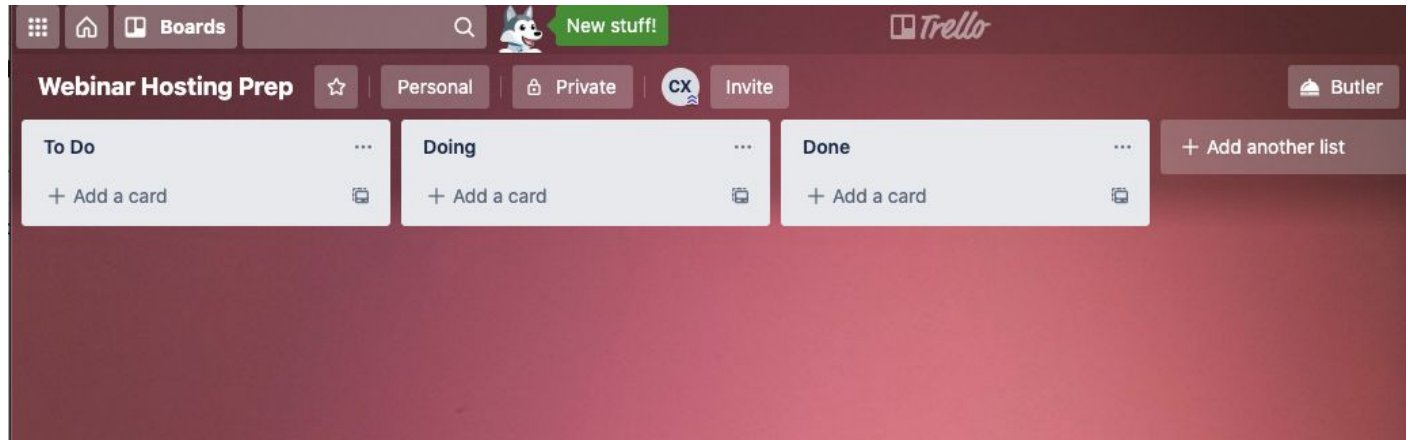
Search by keywords and pick the one you like! I chose something related to our online seminar theme. Once done, click **Create Board**.



Add Lists

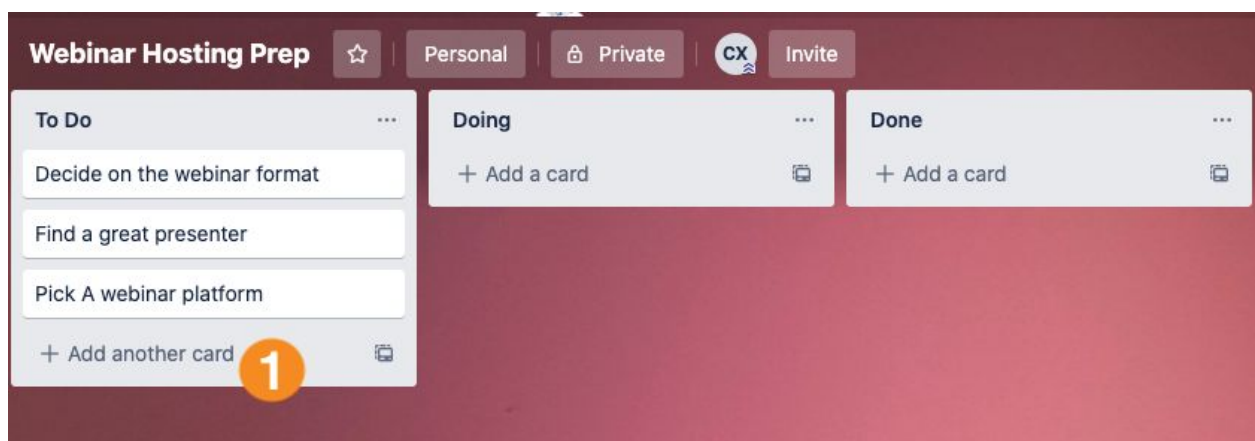
Recall that a Trello board is made up of lists, which often represents steps.

In Trello, you can create as many lists as you want and order them however you like. Let's create three lists: **To Do**, **Doing**, and **Done** to represent the status of tasks that need to get done for hosting a webinar.



Add Cards

Now add cards to the **To Do** list. For the demo purpose, I am adding some simple tasks: **Decide on the webinar format**, **find a great presenter**, and **pick a Webinar platform**.



Add Card Details



We need to decide on the webinar format first before we start to look into finding a great presenter. Let's add more information to it:


- Create a **Checklist** of webinar formats we need to check out
- Set a **Due Date** for it


Click on the ***Decide on the webinar format*** card.

Select **Checklist** from the right-hand side menu.


The screenshot shows a Trello card titled "Decide on the webinar format" in the "To Do" list. The card has a description field with the placeholder text "Add a more detailed description...". Below the description is a green "Save" button and a close icon. To the right of the description field are buttons for "Formatting help" and "Show Details". Below the description field is an "Activity" section with a comment input field labeled "CX" and the placeholder text "Write a comment...". On the right side of the card, a menu is open with the title "ADD TO CARD". The menu items are: "Members", "Labels", "Checklist" (highlighted with an orange dashed border), "Due Date", "Attachment", "Cover", "POWER-UPS" (with a sub-item "Get Power-Ups"), "ACTIONS" (with sub-items: "Move", "Copy", "Make Template", "Watch", "Archive", "Share").

Now let's add some popular formats: *Single Speaker Chat Style*, *Interview Style*, *Panel Discussion*, *Q&A - Ask Me Anything*.

 **Decide on the webinar format**
in list [To Do](#)

 **Description**

Add a more detailed description...

 **Webinar formats checklist**

Delete

0%

☐

Single Speaker - Chat Style

☐

Interview Style

☐

Panel Discussion

☐

Q&A - Ask Me Anything

Add an item

Let's also set a deadline for this task. Also on the same menu, select **Due Date** and set the due date to be May 15th (or any other date). You may also specify a time.

Change Due Date

×

Date

5/15/2020

Time

4:00 PM

Prev

May 2020

Next

Su	Mo	Tu	We	Th	Fr	Sa
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

Set Reminder

1 Day Before

Reminders will be sent to all members and watchers of this card.

Save

Remove

🔔

Enable the Calendar Power-Up!

You'll get a calendar view of your cards and an iCal feed. Woo!

Once done, click **Save**. Now the task has a due date as well a checklist.

To Do

...

Decide on the webinar format

🕒 May 15

📝 0/4

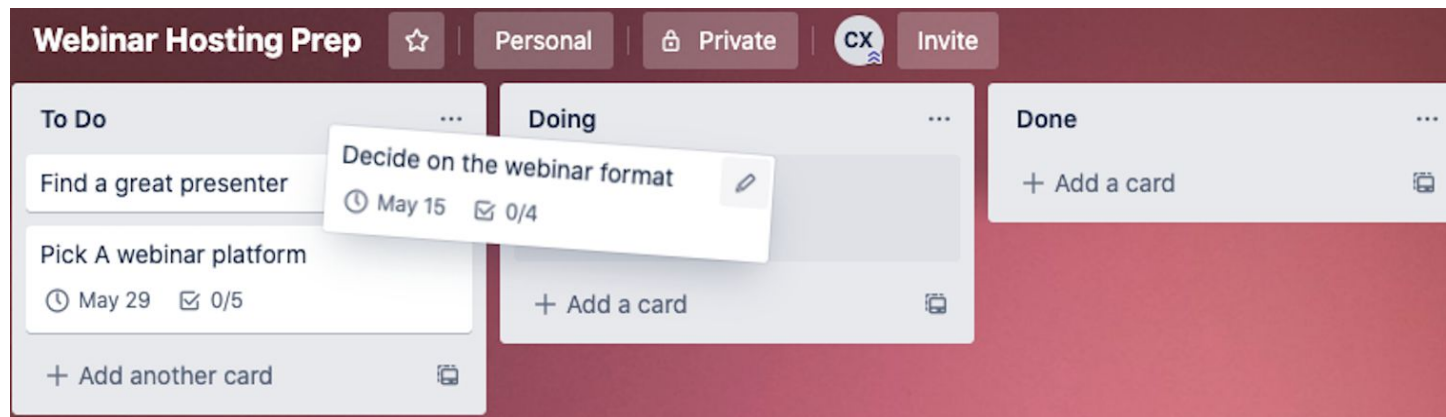


You can also [add more information](#) to this card, including

- Attachments
- Comments
- Labels
- Description

Making Progress

Now it's time to get some work done and make some progress. Since we are going to decide on the webinar's format first, let's drag and drop that card into the **Doing** list.



As we are researching and learning more about webinar formats, don't forget to check the box after one format has been researched.



Decide on the webinar format
in list [Doing](#)

DUE DATE

☐ May 15 at 4:00 PM ▾

Description

Add a more detailed description...

☒ **Webinar formats checklist** Hide completed items Delete

100%

- ☒ Single Speaker - Chat Style
- ☒ Interview Style
- ☒ Panel Discussion
- ☒ Q&A - Ask Me Anything

Add an item

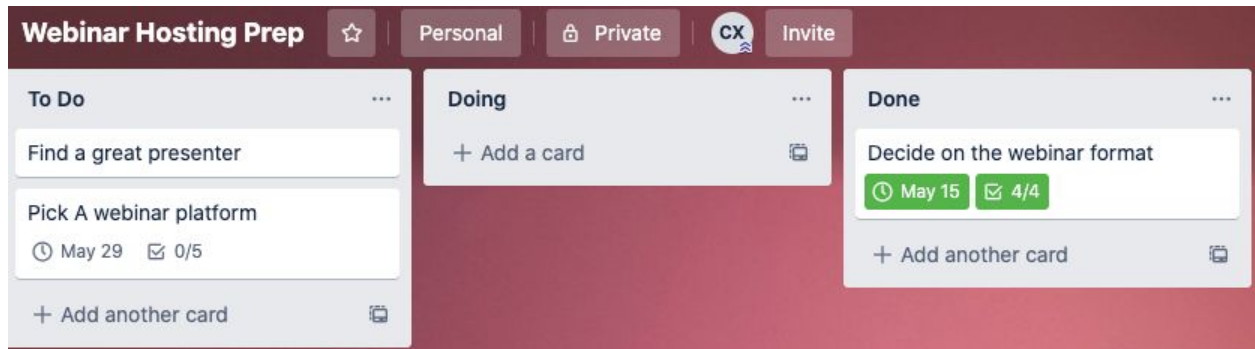
Now it looks like you've studied all the common formats before the due date. Let's check the box in front of our May 15th due date.

DUE DATE

☒ May 15 at 4:00 PM **COMPLETE** ▾

This task is done! Let's now move it to the **Done** list.





Exercise

Now it's your turn to try Trello out! If you are following along, here are some simple tasks for you to work on:

For the card ***Pick a webinar platform***:

- Make a checklist
- Set a due date
- Add a cover (Hint: it's in the same menu with **Checklist** and **Due Date**)
- Write a comment
- Move it around

Don't know what platforms are out there (and don't feel like searching it up)? Here are some names we got for you: Zoom, WebEx, Google Hangouts Meet, Livestorm and Adobe Connect.

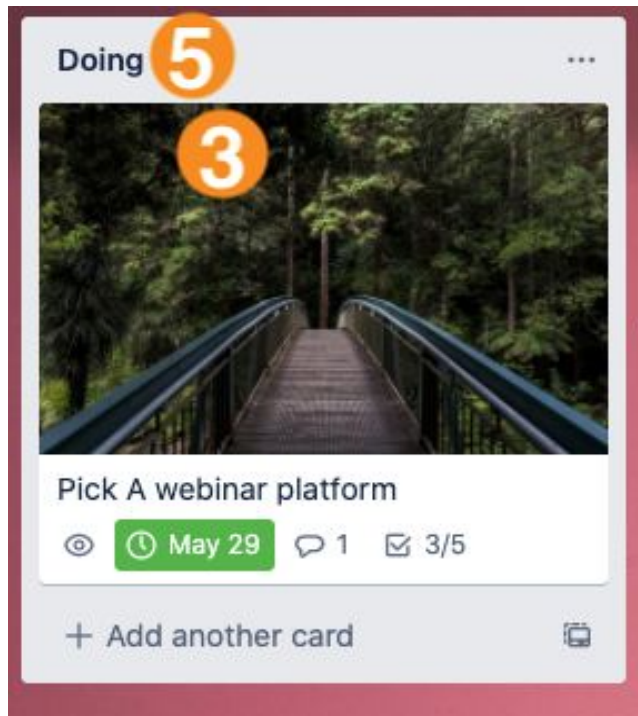


Proposed Solution & Discussion

(Please note that this is only one approach, and not the *only* solution)

The screenshot shows a Trello card titled "Pick A webinar platform" in the "To Do" list. The card has a due date of "May 29 at 4:00 PM" and a status of "COMPLETE". A red circle with the number "2" is next to the due date. The card has a description field with the placeholder text "Add a more detailed description...". Below the description is a checklist titled "Webinar platforms checklist" with a progress bar at 60%. The checklist items are: Zoom (checked), WebEx (checked), Google Hangouts Meet (checked), Livestorm (unchecked), and Adobe Connect (unchecked). A red circle with the number "1" is next to the checklist title. There is an "Add an item" button at the bottom of the checklist. To the right of the checklist are buttons for "Hide completed items" and "Delete". Below the checklist is an "Activity" section with a "Show Details" button. The activity section has a comment input field with the placeholder text "Write a comment..." and a green circular icon with a white 'G'. Below the input field is a comment from a user with the profile picture of a person wearing sunglasses, with the text "just now" and a red circle with the number "4". At the bottom of the activity section are links for "Edit" and "Delete". On the right side of the card, there are sections for "ADD TO CARD" (Members, Labels, Checklist, Due Date, Attachment), "POWER-UPS" (Get Power-Ups), and "ACTIONS" (Move, Copy, Make Template, Watch (checked), Archive, Share).





Feel free to create your own board of a project or goal to work on. Trello also provides you with lots of professional, ready-made [templates](#) to accelerate things. Please share your board (of any topic) with your peers in the discussion forum. Inspire us with more creative and organized ideas.

In later courses, you will see tutorials focused more on the software tasks - stay tuned.